

**SAN FRANCISCO PUBLIC LIBRARY
TECHNOLOGY PLAN
July 2000**

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I. EXECUTIVE SUMMARY

Mission

The San Francisco Public Library (SFPL) system is dedicated to free and equal access to information, knowledge, independent learning and the joys of reading for our diverse community.

Values

- Quality collections and services that are responsive to community needs
- Excellent customer service
- Diversity in collections, services, staff and community
- Equitable distribution of resources and services
- Accessible facilities and resources
- Lifelong learning
- Strong neighborhoods and a shared city vision
- Environment that fosters staff development and teamwork

Introduction

The San Francisco Public Library's Technology Plan describes technology-related projects and initiatives that enable or support library directions and strategies in the Library's draft Strategic Plan, 2000-2003. The projects described here, whether planned or currently in progress, serve to enhance the Library's delivery of services to the public and to optimize support to staff in their delivery of those services.

The Technology Plan Committee ("the Committee") was formed in July 1999 to develop a three-year technology plan. Its charge was to identify technology solutions that support the Library's Strategic Plan, which was being developed at that time. The workbook *Wired for the Future: Developing Your Technology Plan* by Diane Mayo and Sandra Nelson (Chicago: American Library Association, 1999) served as our guide through the planning process.

From July through September we gathered information about SFPL technology needs and the current situation. In August the Committee conducted a system-wide survey of the staff's technology skills and staff's perception of the public's technology skills. This provided an overall picture of training requirements (see Appendix C).

By studying the data gathered, reviewing the goals and activities being developed for the Strategic Plan, discussing Committee members' own ideas and those of other staff, and with input from the Management Team, we grouped the information into three priority areas: Graphical User Interface (GUI) Implementation, Seamless Interface, and Management Technology. This became the focus for the Technology Plan.

Scope

Because of its focus on the three priority areas, this Plan's scope addresses a portion, albeit major, of library technology. With this focused approach, we do not intend to exclude other current or emerging technologies but rather to develop the first phase of creating a growing, living document that will adapt to changes in technology and in the environment. As a living document, this plan provides an avenue for development of technology projects as they emerge. Some of the coming projects that will be added to the plan are:

- Radio frequency identification system as a replacement for barcode technology
- Self-service technologies, such as self-checkout machines
- Building management control systems
- E-books
- Security systems
- Virtual reference services
- Migration to Web-based Integrated Library System (ILS)

GUI Implementation

The move of library automation vendors from text-based integrated library systems to graphical and web-based systems is a significant factor in the development of the plan. SFPL's system, Data Research Associates' (DRA) Classic System, is transitioning to this environment with its Taos product. During this transition DRA has developed a web-based catalog that operates with Classic systems and in Fall 2000 will be offering a Taos cataloging module as well. In anticipation of a fully graphical, web-based system, replacing dumb terminals with PCs throughout the system is the first step in preparing the Library for such a migration.

GUI Implementation refers to our migration from an automated system that is text-based to a graphical environment, which requires PCs rather than dumb terminals. We found that to move to a PC-based graphical environment we needed to consider the readiness of the Library's facilities and infrastructure and that of the staff and public.

Facilities and infrastructure issues in our GUI plan are the physical elements in a library building that need to be in place to handle the technology. Because of the timeline of the coming technology and the necessity for the facilities and infrastructure to be ready for its installation, our Committee had to re-focus: not only were we to develop a plan but to implement it as well. The Chief of Branches worked with branch staff to identify what equipment was in place; then listed the equipment that was coming, such as PCs from InFoPeople (a project of the California State Library), the Gates Library Initiative (a program of the Bill and Melinda Gates Foundation), and those being purchased with Library funds; fax machines; cash registers and receipt printers. A primary concern that surfaced was whether the branches' electrical systems could withstand all this technology.

The Building and Grounds Superintendent arranged with outside engineers to evaluate the electrical capacity in each branch. The study results categorized the branches by the

severity and complexity of needed electrical work, some to be done in-house and the more complex work to be contracted out. The Library then redirected funds and budgeted funds in the next fiscal year (FY) for the electrical work.

Another element in preparing the infrastructure is installing T-1 lines, which are data communication lines that are more reliable and faster than phone lines. In conjunction with the Department of Telecommunications and Information Services (DTIS), the Library's Automation Services Division took responsibility to install T-1 lines in all branches without them. By the end of FY 1999/2000 all but one branch (Ingleside) had T-1 lines installed.

As a planning document to guide branches and departments through this process, the Committee put together a GUI implementation checklist and timeline. This shows the various activities related to implementation, responsibility for each task and a method to chart progress. The plan was sent to Branch Managers and Main Library Managers in February 2000.

In conjunction with GUI Implementation, Automation Services submitted budget proposals to Library administration for three projects for FY 2000/2001:

1. Branch Library Network Upgrade – This is year two of a three-year plan to replace staff and Online Public Access Catalog (OPAC) terminals with PCs.
2. Main Library Network Upgrade – This is also year two of a three-year plan to replace terminals with PCs
3. Technology Refreshment – This is a new program and year one of a continuing program to replace outdated staff PCs. In the first year, five-year-old PCs will be targeted. Subsequently, we intend to be on a three-year refreshment cycle. This will allow staff to use the latest electronic resources and for all of us to have identical and current software versions and operating system.

Staff and public preparedness is the other, essential, part of the GUI Implementation plan. Since the introduction of the Web2 catalog in Winter, 1999, the Committee coordinated and conducted Web2 training. After Web2 introduction at various staff meetings, we developed a Web2 catalog training program for Main and Branch staff who had expressed interest in serving as trainers themselves. Committee member Steve McLaughlin conducted these classes starting in December 1999. Web2 is now part of the public training program.

We have undertaken a number of other activities to prepare staff and the public for a graphical, PC-based system. For example, we:

- Created an instructional brochure for the public to use as a guide for using the Web2 catalog, one for graphical access and another for text-based access
- Developed a list of basic computer skills that staff will need. We are working with the Staff Training and Development Committee (STADCOM)

to identify classes that cover these areas and classes that need to be developed (see Section II – B Staff and Public Preparedness).

- In conjunction with Public Affairs, prepared publicity to introduce the new technology to the public, such as news releases and a "Mouse Alert" poster for branches.

Management Technology

Management Technology is defined as technology that helps staff members do their jobs better. Some identified projects are:

- Standardizing server and workstation operating systems and software
- Implementing software that allows Automation Services to install and update software remotely
- Standardizing reports and statistics
- Upgrading the branch telephone system
- Replacing Pacific Bell Voice Mail with an internal voice mail system in the Main Library
- Developing the Intranet ("StaffNet")
- Refining the e-mail reference service
- Providing text, multi-media and online training tools, pathfinders and programs.

Some of these activities are being handled by committees or units and are already in progress; others are new.

Seamless Interface

Seamless Interface is defined as facilitating the access to our electronic resources; it relates to the public and staff's interaction with the Library's electronic presence. Issues that are being looked at include providing a single, easy-to-use interface, making navigation through the system easier, and having consistency in the methods of access and look of the screens. These projects have been grouped into four sections:

1. Regional Connectivity, which addresses our cooperation and collaboration with other libraries, departments and local organizations.
2. Gateway issues, which include community information files, standard interfaces, web page development and access to web resources.
3. Catalog Enhancements, such as making the catalog easier to use, developing multilingual access and implementing catalog clean-up projects.
4. Interactive Access, under which we include such activities as providing online forms and registration for workshops.

As with Management Technology, some Seamless Interface projects are in progress.

Plan Implementation and Maintenance

This Technology Plan is a living document that should be flexible to adapt to changes within the Library as well as changes in the external environment. Changes affecting the economic, social and political environment and changes in personal lifestyles all affect technology options and choices. The implementation course of specific projects under the three priority areas, GUI Implementation, Management Technology and Seamless Interface, will adapt over the time of this three-year plan to reflect environmental changes.

A Technology Oversight Committee (TOC) will oversee the implementation and maintenance of the Technology Plan. At the beginning of a project's implementation, the responsible party(ies) will develop a detailed action plan with a timeline and costs as appropriate. During the course of the project the responsible party(ies) will provide progress reports to the Committee. The Committee will meet quarterly to monitor the progress of the projects and make adjustments as necessary. In addition, the Technology Oversight Committee will solicit and receive new and emerging project descriptions and action plans and add them to the plan annually.

II. GRAPHICAL USER INTERFACE (GUI) IMPLEMENTATION PLAN

The move of library automation vendors from text-based integrated library systems to graphical and web-based systems is a significant factor in the development of the Plan. SFPL's system, Data Research Associates' Classic System, is transitioning to this environment with its Taos product. During this transition DRA has developed a web-based catalog that operates with Classic systems and in Fall 2000 will be offering a Taos cataloging module as well. In anticipation of a fully graphical, web-based system, replacing dumb terminals with PCs throughout the system is the first step in preparing the Library for such a migration.

The three components of the GUI Implementation Plan are:

- A. Facilities and Infrastructure
- B. Staff and Public Preparedness
- C. Publicizing the Work of the Technology Plan Committee

A. Facilities and Infrastructure

Facilities and infrastructure issues in our GUI plan are the physical elements in a library building that need to be in place to handle the technology. The Chief of Branches worked with branch staff to identify what equipment was in place; then listed the equipment that was coming, such as PCs from InFoPeople, the Gates Library Initiative grant, and those being purchased with Library funds; fax machines; cash registers and receipt printers.

1. Project: Improve and modernize the building infrastructure of branch libraries.

Purpose: The infrastructure (electrical and telecommunications wiring capacity) of branch libraries needs to be able to support the technology required for a full GUI environment and the equipment for day-to-day library operations, such as PCs, printers, cash registers and fax machines.

Project Start: FY 1999/2000 **Project End:** Ongoing

Responsibility: Operations Staff / Chief of Branches

Funding: Operations

Action Plan: The steps under this category involve the professional evaluation of each branch building's electrical system by an outside contractor. Completion of the identified electrical, data cabling and related structural work will be done in phases. The report's ranking of the needed electrical work by priority -- high, medium and low -- is one criterion in scheduling upgrades and repairs. SFPL Operations staff determined the less complex work that can be done in-house. The Library identified funds

in FY 1999/2000 to hire additional staff to complete this work. In FY 1999/2000 the Library utilized supplemental appropriations to fund electrical and data infrastructure improvements at three locations: Richmond, Anza and North Beach. These three projects will be completed during Fall 2000. Two to three additional branch projects have been identified for funding and completion during FY 2000/2001. The City and County of San Francisco's (CCSF) Department of Public Works/Bureau of Engineering (DPW/BOE) will coordinate the Department of Public Works/Bureau of Architecture (DPW/BOA) team that will work with the Library's staff on the development of detailed cost plans for completing the needed upgrades. The resulting design plan will include electrical, data cabling and abatement. The identified work will be contracted to an outside firm.

In November 2000 the Branch Library Improvement Bond Program will be on the ballot. The outcome of this election will determine the strategy for scheduling and funding the remaining projects.

Status: As of February 2000 the electrical assessments of 24 branches have been completed and individual reports by location developed. In March 2000 SFPL Operations staff and CCSF electricians began the work designated as in-house. In September 2000, DPW/BOE reports, detailing scope of work and cost estimates, will be sent out to bid. The actual work is scheduled to begin late Fall 2000.

Updated: 6/00

2. Project: Create space in the public areas of each branch for placement of computer workstations.

Purpose: The floor plans of branch libraries are in need of redesign/reorganization, including the addition of data/electrical connections and new furniture to make technology "fit."

Project Start: November 1999 **Project End:** December 2000

Responsibility: Operations Staff / Chief of Branches

Funding: Operations / Chief of Branches

Action Plan: This process began with discussion among branch managers of the available options for making technology "fit." After some analysis it was determined that some branches would not need to make major changes to the design of their space. Others could accommodate the new equipment by rearranging furniture and a limited number would require additional new furniture designed to hold workstations. Each site developed a floor plan showing the number and placement of electrical outlets, current furniture and equipment locations and any planned changes.

Furniture needs were assessed and plans made to purchase furniture to hold equipment and/or to free floor space. The Chief of Branches office set aside funds in the 1999/2000 fiscal year to purchase computer-related furniture. A bid was prepared, approved and awarded to a vendor in June 2000.

Status: Delivery and installation of furniture is scheduled to take place in the following 60 days. Funds are included in the FY 2000/2001 budget to continue to address furniture needs. Larger design projects that are related to electrical/data infrastructure are included in the previous project.

Updated: 6/00

3. Project: Install a T-1 line and network equipment in every branch.

Purpose: Establish the appropriate telecommunications links and hardware at each location to allow for optimal connectivity between branches and to outside resources. T-1 lines allow for faster transmission of data than traditional telephone lines and they facilitate the creation of a Local Area Network (LAN) set-up at the branch, which means that multiple graphic workstations can be interconnected.

Project Start: 1998 **Project End:** June 2000

Responsibility: Automation Services

Funding: Automation Services / Grant Funding

Action Plan: Automation Services staff determine which branches are connected and develop a schedule for installation. Funds are identified and Pacific Bell is contracted with to install these lines. In addition to the T-1 lines, a LAN requires additional network equipment and a dedicated computer to act as a server. Automation Services staff recommend equipment and its placement; assess existing hardware, including leased equipment; and determine new equipment needs. Automation Services staff oversee the purchasing process and installation.

Automation Services staff coordinate all telecommunication-related tasks.

Status: T-1 lines have been installed in 25 branches as of June 30, 2000; the remaining T-1 for Ingleside will be completed as part of the build-out at the newly-leased site by October 30, 2000.

Updated: 6/00

4. Project: Create an all-graphical PC environment in the Main Library and branches for the public and staff.

Purpose: To facilitate better access to electronic resources and modern online bibliographic library databases, staff and patrons must have PC-based workstations.

Project Start: FY 1998 **Project End:** Ongoing

Responsibility: Automation Services / Chief of Branches / Chief of Main

Funding: Automation Services / Grant Funding

Action Plan: This is a system-wide project to be completed in phases. In the early stages of implementation the Library will focus on trading or swapping out text-based (dumb) terminals with PCs capable of providing a graphical user interface to our resources and the Internet. The total number of online access points for staff and public at a specific facility will therefore remain the same.

The Library received a grant for the 1999/2000 fiscal year from the Gates Library Initiative (GLI) for a total of 90 PCs and 15 printers - six public PC workstations and one printer at 15 locations. The Main Library also received a GLI grant for PC workstations and presentation equipment to develop a public training facility on the fifth floor.

Automation Services has submitted three proposals for consideration and implementation in the 2000/2001 fiscal year to the city's Committee on Information Technology (COIT). These proposals are:

- Replace the staff and public terminals with PC workstations at the Main Library
- Establish a refreshment program in which computer hardware more than three years old is replaced annually
- Complete the networking of the branch libraries

Library administration has submitted companion-funding proposals for these projects for consideration in the FY2000/2001 budget cycle.

Status: By June 30, 2000 a total of 96 public graphical computers were installed in the branch libraries. These workstations replaced terminals. By October 1, 2000 the remaining grant-funded PCs and the balance of the Library-funded Phase I PCs will be installed. COIT has approved the three projects and funding for them was approved in the Library's FY 2000/2001 budget.

Updated: 6/00

B. Staff and Public Preparedness

Staff and public preparedness is the other, essential part of the GUI Implementation plan. A list of basic computer skills required by staff has been developed in order to identify classes that are needed.

1. Project: Basic computer skills set for all SFPL staff.

Purpose: The Technology Plan Committee developed a set of basic computer skills that would address what knowledge staff would need to operate in an all-GUI environment.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Human Resources / Staff Training and Development Committee (STADCOM) / Office of Children and Youth Services (OCYS)

Funding: Human Resources Training Budget

Action Plan: The set of skills developed by the committee was matched with training classes already offered by the Library's Human Resources Training Division. The name of the class, how it was made available to staff, how often it was offered and if it needed to be modified was added to each skill. The following is the skills set:

a. WINDOWS

- Start Up
- Shut Down
- Introduction to Icons
- Mousing
- Network Neighborhood
- Sharing Files
- Accessing Shared Files
- Multi-tasking (clicking between multiple applications)
- Cutting and Pasting Text

Training class: Windows 95 Introduction

Available: Quarterly Training Schedule

Offered: Twice/quarter (in-house)

Will need to be modified as the library moves to Windows NT.

Current trainers can teach Windows NT.

b. CATALOG

- Web2
 - Authority Searching
 - Keyword Searching
 - Other Databases
 - Own Record

Training class: Public Access Catalog

Available: Quarterly Training Schedule

Offered: As Needed (in-house)

Will need to be modified. More Trainers will be needed.

c. SOFTWARE

- Microsoft Word
- Virus Scan
- Microsoft Office – knowledge of the applications that exist and training on the ones that are needed for current job

Training classes: Word 97 Beginning, Pt. A & B

Intermediate (if needed)

Available: Quarterly Training Schedule

Offered: Once/quarter each part (in-house)

Will need to be modified as new computers are installed with Word 2000. Current trainers can teach Word 2000.

d. INTERNET

- Defining the Internet
- URLs
- Search Engines
- Telnet
- Navigation
- Searching
- Downloading
- Bookmarking

Training classes: Introduction & Exploration of the Internet

Intermediate Internet

Available: Quarterly Training Schedule

Offered: Once/quarter (in-house)

Additional training classes: Various subject-based InFoPeople workshops (in-house & off-site).

e. STAFF E-MAIL

- DRA
- Eudora

Training classes: Introduction to DRA

Introduction to Eudora

Available: Quarterly Training Schedule

Offered: DRA once/quarter; Eudora once/6 months (in-house)
Will needed to be modified as more staff acquire PCs.
New trainer will need to be found.

f. ELECTRONIC SEARCHING (IRMO)

- Home Page
- Reference Databases

Training class: IRMO meetings/Vendor presentations
Available: Announced on e-mail once a month
Offered: 2nd Friday/month

g. TRAINING STAFF AS TRAINERS

Training classes: Need to be developed for Web2 and
Troubleshooting.

h. WEB PAGE MAINTENANCE

Training available: Introduction to HTML
Available: Quarterly Training Schedule
Offered: Twice/quarterly (off-site)
More classes are available through InFoPeople

i. TROUBLESHOOTING/BASIC DIAGNOSTICS

- Hardware
- Software

Training Class: MicroComputer Overview
Available: Quarterly Training Schedule
Offered: Once/Quarter (off-site)
More classes need to be developed. Handouts are also available:
Microsoft Quick Source: Windows NT 4, Word 2000 (soon).

Additional skill set suggested by STADCOM:

j. EDUCATIONAL DISCOVERY CENTER (EDC)

- Reference
- Troubleshooting

Training class: Office of Children's and Youth Services (OCYS)
staff have offered.
Offered: Irregular
A class needs to be developed that is aimed at the Children's
librarians.

C. Publicizing the Work of the Technology Plan Committee

All of the Committee's work would be for naught if its members were the only ones to know about it. Each piece of publicity evolved as the Committee recognized the need to a) keep SFPL staff informed, b) prepare Library patrons for coming technology-based changes and c) publicize the Library's efforts to the general public.

1. Project: Web2 patron handout

Purpose: This project is expected to guide the public through the Web2 interface when using the catalog and related databases.

Project Start: Fall 1999 **Project End:** May 2000

Responsibility: Technology Plan Committee working with Information Services / Automation Services / Staff Web2 Trainers / Public Affairs

Funding: Public Affairs

Action Plan: When the Library adapted DRA's web-based (graphical) catalog interface for staff and public use in late 1999, the Library had a responsibility to introduce these new features. In addition to training staff in the use of the interface (see section Staff and Public Preparedness), the Committee produced two handouts that guide patrons using graphical and Lynx-based browsers to search our catalog and related databases (SF Community Connection, the SF Historical Photograph Collection and the Library of Congress Catalog) in Web2.

Status: Completed

Updated: 6/00

2. Project: Graphical User Interface (GUI) publicity

Purpose: To create patron awareness of the planned addition of graphical PCs for public use in the branches.

Project Start: April 2000 **Project End:** 2003

Responsibility: Technology Plan Committee / Public Affairs

Funding: Public Affairs

Action Plan: The Library's goal of becoming an all-graphical environment within the next three years can be successful only if users are prepared for the coming technology. Many Library users (public and staff alike) are only familiar with our

text-based (Lynx) environment and have difficulty adapting to the PC/mouse environment. The Committee wanted a way to inform the Library's knowledgeable computer users of the coming, improved technology, while at the same time encouraging the uninitiated user to ask Library staff for more information. A generic poster heralding the arrival of PCs -- with emphasis on defining the difference between a computer mouse and a rodent -- was developed and distributed to branches. Omitting specifics such as dates and locations of installation mean that posters can be displayed for the duration of the GUI implementation.

Status: Ongoing

Updated: 6/00

3. Project : Keeping staff apprised

Purpose: To bring to the attention of all Library staff the efforts and accomplishments of the Technology Plan Committee.

Project Start: March 2000 **Project End:** June 2000

Responsibility: Technology Plan Committee

Funding: N/A

Action Plan: The work of the Technology Plan Committee has not been widely visible among Library staff except for two occasions since the Committee was convened in July, 1999: the system-wide survey of the staff's technology skills and their perception of the public's technology skills (August 1999) and the introduction of the Web2 interface (early 2000).

The Committee felt it was necessary to bring this work to our colleagues' attention in order to answer specific questions about technology projects, as well as to help keep the staff generally well-informed. Four major steps were taken to accomplish that goal:

- First, Committee Chair Vivian Pisano made an oral presentation at the Library's All-Staff meeting in March 2000 at which she presented the goals, activities and accomplishments to-date of the Technology Plan Committee.
- She then set down these goals, activities and accomplishments in an article for the March/April 2000 issue of the Library's in-house publication *Folio*.
- Next, a sub-committee of this Committee wrote another article for *Folio*, explaining the purpose and the processes involved in formulating the Technology Plan itself. The article conveyed to staff that the plan is a working document, a framework for the ever-changing technology needs of SFPL.

- Finally, the Committee produced the Technology Plan itself -- this report -- which details the Library's three-year plan for upgrading and refreshing technology throughout the system.

Status: Complete

Updated: 6/00

4. Project: Publicizing graphical equipment in the branches

Purpose: To bring citywide attention to the placement in the branches of graphical PCs for public use.

Project Start: June 2000 **Project End:** July 2000

Responsibility: Technology Plan Committee / Public Affairs

Funding: N/A

Action Plan: Although an in-branch publicity project was launched (see above), the Committee determined it was necessary to use additional means to inform the neighborhoods that graphical Internet access was (or would soon be) available. The Committee and Public Affairs staff will create a press release about the addition of publicly-accessible graphical equipment in the branches, which is being funded by such sources as the Bill and Melinda Gates Foundation and InFoPeople. The press release will be written to pique the interest of neighborhood newspapers and citywide electronic and print news outlets. It will be released on a rolling calendar: after each branch's public PCs have been installed, the release will be sent to the local and citywide press.

Status: Will begin after the first branch's PCs are installed.

Updated: 6/00

Lynx Catalog Brochure – Page 1

OTHER DATABASE OPTIONS

- ⑥ **San Francisco Community Connection:** Search for more than 2,000 local government agencies, health & human service providers, AIDS/HIV service providers, community organizations and neighborhood & merchants' associations.
- ⑥ **Library of Congress catalog:** Search for 12 million books, maps, manuscripts, computer files and audio/visual materials.
- ⑥ **Magazines, newspapers and reference databases:** Find a wide variety of information in more than 70 databases. On the Library's homepage, choose "Electronic Resources" and then choose "Reference Databases."

See the bottom of the computer screen
for more directions.
For help searching the
Library's catalog
or any of the online databases,
ask Library staff
for assistance or call us at
415/557-4400.



San Francisco Public Library

100 Larkin Street
San Francisco, CA 94102
415/557-4400

Web Catalog/LYNX - Patron Handout
April, 2000
sfpl-327



San Francisco Public Library

Searching the Online Catalog and Related Databases in LYNX

<http://sfpl.lib.ca.us>

SFPL Online Catalog: Search
for more than two million books,
compact discs, videotapes and
books on tape
owned by the Library.

*(Magazines and newspapers can
be found on the homepage.
Choose "Electronic Resources"
and then choose
"Reference Databases.")*

STARTING A CATALOG SEARCH

- Ⓢ **Type the appropriate number** for the World Wide Web (Internet) and **press ENTER**.
- Ⓢ **Press ENTER** for THE CATALOG.
- Ⓢ **Press ENTER** to choose the location where you'd like to look for materials.
- Ⓢ **Highlight** *Begin Searching* and press ENTER.
- Ⓢ **Press ENTER** for The Catalog. Use *up* and *down* arrow keys for OTHER DATABASE OPTIONS.
- Ⓢ **Type onto the dotted line** the title, subject word(s) or name for which you are looking.
- Ⓢ **Use the down arrow** to choose from numerous languages and formats (e.g. books, audio/visual materials) for your search.
- Ⓢ **Move the up arrow** until it rests on the kind of search

you want to perform (KEYWORDS, AUTHOR, TITLE or SUBJECT). Press ENTER.

- Ⓢ **Press ENTER** for results. Arrow down and press ENTER for desired FULL RECORD, complete with location information.

FEATURES

Ⓢ **Advanced keyword searching:**

- ▶ Combine several words by using *and* between the words to search them all (*San Francisco AND earthquake*). Use *or* if there is more than one acceptable word for which you are looking. Use *not* if there is a word you want to exclude from your search.
- ▶ Type *su travel and ti Italy* to find items with the subject *travel* that have *Italy* in the title; type *au angelou and ti bird* for items by the author Maya Angelou containing the word *bird* in the title.

Ⓢ **Incorrect spelling is forgiven:**

Misspelled titles and names are placed alphabetically in a list that provides the nearest matches to what you typed.

- Ⓢ **Leading words:** Always drop the articles that begin titles, such as *A, An, The, La* (Spanish) and *Les* (French).

- Ⓢ **Locations:** The Holdings listing shows where in the Library your title can be found.

- Ⓢ **Partial spelling:** Type enough to identify the author, title or subject you want to find (e.g. *horse whis* will find "The Horse Whisperer" in a TITLE search).

- Ⓢ **Punctuation:** You can omit all punctuation, but if a hyphen is part of a name or term (such as *low-cost* or *self-help*) you must include it or leave a space where it would be placed.

- Ⓢ **Upper/lower cases:** Type in either upper or lower case.

Graphical Catalog Brochure – page 1

OTHER DATABASE OPTIONS

- ⑥ **San Francisco Community Connection:** Search for more than 2,000 local government agencies, health & human service providers, AIDS/HIV service providers, community organizations and neighborhood & merchants' associations.
- ⑥ **San Francisco Historical Photograph Collection:** Search a large sampling of the Library's vast collection of historical local photographs.
- ⑥ **Library of Congress catalog:** Search for 12 million books, maps, manuscripts, computer files and audio/visual materials.
- ⑥ **My Account:** Verify your name and address, review titles borrowed/dates due/items on reserve, cancel reserved items and view any fines owed (you must have an SFPL Library card and 4-digit PIN).
- ⑥ **Help:** Find searching tips, answers to questions about searches and connections to Library information.
- ⑥ **Magazines, newspapers and reference databases:** Find a wide variety of information in more than 70 databases. On the Library's homepage, click on "Electronic Resources" and then on "Reference Databases."

Instructions for using LYNX to search the catalog are available from Library staff.

For more help searching the Library's catalog or any of the online databases, ask Library staff for assistance or call us at **415/557-4400**.



San Francisco Public Library

100 Larkin Street
San Francisco, CA 94102
415/557-4400

Web Catalog/Graphical - Patron Handout
April, 2000
sfpl-326



San Francisco Public Library

Searching the Online Catalog and Related Databases

<http://sfpl.lib.ca.us>

SFPL Online Catalog: Search for more than two million books, compact discs, videotapes and books on tape owned by the Library.

(Magazines and newspapers can be found by clicking on "Electronic Resources" and then choosing "Reference Databases.")

Graphic Catalog Brochure – page 2

STARTING A CATALOG SEARCH

- ④ **Choose** THE CATALOG.
- ④ **Choose** the library location where you'd like to look for materials.
- ④ **Click** BEGIN SEARCHING.
- ④ **Type** into the box the name, title or subject word for which you are looking.
- ④ **Click** on AUTHOR, TITLE or SUBJECT to begin the search. (Or press ENTER to begin a keyword search).
- ④ **When searching** for a specific person as the SUBJECT, type last name first.

FEATURES

- ④ **Advanced keyword searching:**
 - ▶ Combine several words by using *and* between the words to search them all (*San Francisco AND earthquake*). Use *or* if there is more than one acceptable word for which you are looking. Use *not* if there is a word you want to exclude from your search.

- ▶ Type *su travel and ti Italy* to find items with the subject *travel* that have *Italy* in the title. Type *au angelou and ti bird* for items by the author Maya Angelou containing the word *bird* in the title.

- ④ **Formats:** Icons to the left of each title in a list of search results tell you if the title is a book, recording, video, etc.

- ④ **Incorrect spelling:** When doing AUTHOR, TITLE or SUBJECT searches, misspelled words and names are placed alphabetically in lists that provide the nearest matches to what you've typed.

- ④ **Leading words:** Always drop the articles that begin titles, such as *A, An, The, La* (Spanish) and *Les* (French).

- ④ **Limited search:** Boxes near the bottom of the search screen let you narrow your search by years, language and format (e.g. books, audio/visual materials).

- ④ **Locations:** The Item Holdings listing shows where in the Library your title can be found.

- ④ **Partial spelling:** Type enough to identify the author, title or subject you want to find (e.g. *horse whis* will find "The Horse Whisperer" in a TITLE search).

- ❑ **Punctuation:** You can omit all punctuation, but if a hyphen is part of a name or term (such as *low-cost* or *self-help*) you must include it or leave a space where it would be placed.

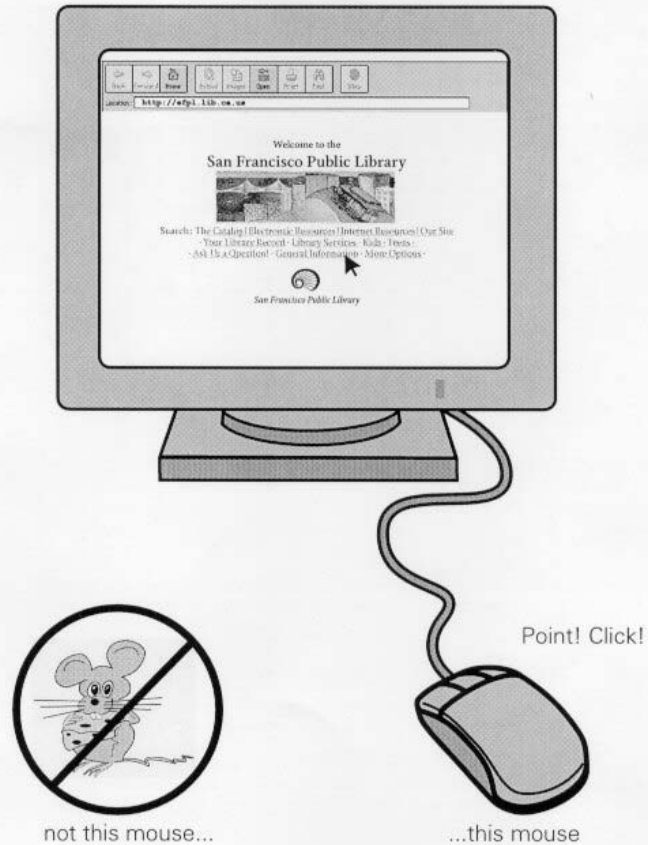
- ❑ **Upper/lower cases:** Type in either upper or lower case.

PLACE YOUR OWN RESERVES ON BOOKS!

- ④ Reserve and request books only.
- ④ Make sure you have no fines or overdue materials, know your four-digit SFPL Personal Identification Number (PIN) *and* have your Library card in hand.
- ④ Search the catalog for the book(s) you want to borrow. (*Sorry, but videotapes, compact discs, books on tape, records, cassettes and reference books cannot be reserved.*)
- ④ **RESERVE THIS TITLE** will appear under the list of holdings. Click on it to place a reserve.
- ④ You will be charged 50 cents *per title* when you pick up your books.
- ④ We will notify you by mail or e-mail when your reserve is ready to be picked up. Make sure to give us your e-mail address.

Mouse Alert Poster

MOUSE ALERT!



Please ask the librarian for more information about our point & click graphical computer workstations.



San Francisco Public Library

III. MANAGEMENT INFORMATION TECHNOLOGY

Management Technology is defined as technology that helps staff members do their jobs better. Some of the identified projects are:

- *Implementing software that allows Automation Services to install and update software remotely*
- *Standardizing reports and statistics*
- *Upgrading the branch telephone system*
- *Refining the e-mail reference service*

A. Project: Standardize server and workstation operating systems and software on all Library computers.

Purpose: This project will allow uniform access to Internet resources and the most recent versions of applications software. It will allow the Automation Services unit to provide better support by eliminating multiple versions of operating systems and applications software.

Project Start: FY 1999/2000 **Project End:** FY 2001/2002

Responsibility: Automation Services

Funding: Automation Services

Action Plan: The operating systems on both servers and workstations will be Microsoft Windows NT or 2000, depending upon the stability of the Windows 2000 product and its ability to support our needs. The Microsoft Office Professional Suite will be the standard applications package for staff workstations. Internet Explorer will replace all versions of Netscape on both staff and public computers. Internet Explorer is more stable than Netscape and has security features that are integrated into the operating system. Workstation security is already in place for public computers using Windows NT, WinSelect, Everybody's Menu Builder, and Fortres. Other possible options for public access stations include scheduling and time-out software and Windows Terminal Services. If these options are appropriate for use in the Library's operation, they will be purchased and installed. Automation Services will determine a common graphical e-mail client and server to replace VMS Mail and the various graphical mail programs now in use by staff throughout the system. VMS Mail will be supported as long as DEC terminals are still in use. Virtual Private Networking (VPN) is already installed and will be expanded to allow staff access to Library resources from home or outside the Library's network.

Before this project can be completed, all staff and public computers must be capable of running standard operating systems and software. A systematic replacement of older workstations and terminals is part of a plan submitted to the City's Committee on Information Technology (COIT). The plan contains three major projects. The first is the upgrade of the Main Library Network and

replacement of terminals with workstations. The second is the upgrade of the Branch libraries and replacement of terminals with workstations. The third is a Technology Refreshment program to replace outdated workstations with newer, more powerful models. These projects are referenced in the Graphical User Interface Implementation Plan.

Status: In process.

Updated: 6/00

B. Project: Install Enterprise Management software to facilitate management and support of all workstations.

Purpose: This project will allow Automation Services staff to efficiently manage and support all desktop operating systems and applications. Features include automatic installation and update of operating systems and software, automatic creation of hardware and software inventories, monitoring software licenses, and remote diagnosis of problems.

Project Start: FY 1999/2000 **Project End:** FY 2000/2001

Responsibility: Automation Services

Funding: Automation Services / Public Library Foundation (PLF)

Action Plan: The Enterprise Management system is Microsoft BackOffice, which includes the Systems Management Server (SMS) and the Sequel Database Server. The BackOffice product was purchased in FY 1999/2000. Client licenses were funded with the 1999/2000 PLF appropriation. Automation staff are to be trained in the administration of Microsoft SMS and SQL with funds from the FY 2000/2001 budget.

Status: In process. Microsoft BackOffice with SMS is installed and client licenses were purchased for 1000 stations.

Updated: 6/00

C. Project: Install a network management system.

Purpose: This project will allow Automation Services staff to efficiently monitor, control, configure, and diagnose problems for local area and wide area network components.

Project Start: FY 1999/2000 **Project End:** FY 2001/2002

Responsibility: Automation Services

Funding: Automation Services

Action Plan: CLEARVISN network management software is already installed for the Main Library Network. Automation Services will investigate other network management systems and determine the best system for SFPL's infrastructure.

Status: In planning. No product has been investigated or installed.

Updated: 6/00

D. Project: Standardize reports and statistics for all systems. Develop a process for requesting and producing custom reports.

Purpose: This project will create a uniform standard for producing and evaluating statistics generated by a variety of systems.

Project Start: FY 1999/2000 **Project End:** FY 2000/2001

Responsibility: All divisions

Funding: To be determined

Action Plan: Set up a committee or taskforce representing all Library divisions to evaluate current statistics and determine needs for statistics not being currently produced, and to determine a process for requesting custom reports. Determine which person or persons will produce custom reports.

Status: In planning. Committee or taskforce members need to be selected.

Updated: 6/00

E. Project: Upgrade the branch telephone systems and connect them to the Main Library switching equipment.

Purpose: This project will standardize the branch telephone systems and centralize the Library's voice communications. This system will integrate with the Library's voice mail system.

Project Start: FY 2000/2001 **Project End:** FY 2001/2002

Responsibility: Automation Services / Department of Telecommunications and Information Services (DTIS)

Funding: Automation Services pending COIT approval

Action Plan: DTIS has provided documentation for several alternative systems and cost estimates for implementing these systems. The Library must determine the means of incorporating this project into the budget.

Status: In planning. Awaiting funding.

Updated: 6/00

F. Project: Replace Pacific Bell Voice Mail with an internal voice mail system that integrates with the Library's telephone system.

Purpose: This project will allow the Library to internally assign and control voice mail for all staff. Current Pacific Bell voice mail must be coordinated by a third party and costs are incurred for additional mailboxes, changes to mailboxes, and the call routing system for Information Services.

Project Start: FY 1999/2000 **Project End:** FY 2000/2001

Responsibility: Automation Services / DTIS

Funding: Automation Services -- Conversion from Pacific Bell monthly payment to lease/purchase

Action Plan: DTIS presented a plan for lease/purchase of Lucent Voice Mail System. The cost of the lease/purchase is equal to or less than the current monthly payments for PacBell voice mail. The Library is moving forward with DTIS on the lease/purchase.

Status: In process. Awaiting delivery of the system.

Update: 6/00

G. Project: Integrate materials recovery / collection agency processes with the online system.

Purpose: This project will facilitate the recovery of materials and costs associated with lost materials.

Project Start: FY 1999/2000 **Project End:** FY 2000/2001

Responsibility: Automation Services / Borrower Services / Chief of Main / Chief of Branches

Funding: IRMO / Automation Services

Action Plan: The DRA Collection Agency Module has been purchased and the Collection Agency license loaded. The contract with Unique Management

Services, the agency that will handle collections of money and materials, is in process. Borrower Services, the Assistant Chief of Main, the Assistant Chief of Branches, and branch representative are meeting to determine procedures. The Library will begin sending second overdue notices for items that are 20 days overdue and change the Assumed Lost threshold from 60 to 45 days.

Status: In process. Awaiting contract with Unique Management Services to be finalized. Board of Supervisors' approval of the collection agency fee is pending.

Updated: 6/00

H. Project: Develop a system-wide staff intranet.

Purpose: StaffNet -- the staff intranet -- will allow for dissemination of policies, procedures, scheduling, events, training, forms, committee activities, staff skills, and official documents. It facilitates integration of online databases to request services and track problems.

Project Start: FY 1999/2000 **Project End:** Ongoing

Responsibility: All divisions / Oversight by Internet/Intranet Committee (NetCom)

Funding: N/A

Action Plan: NetCom distributed a form requesting information for files or services that staff would like to use or provide on the intranet. Content is added on an ongoing basis. The Electronic Services Librarian has the responsibility of coordinating changes to the site and assisting with HTML conversion of documents. NetCom, Engineering, and Automation Services are investigating the possibility of using FM1 tracking system for building and maintenance issues to replace REQFORM and Automation Services problem logging.

Status: In process. Content is being added on a regular basis by some divisions. Other divisions are delegating responsibility and receiving training in HTML.

Updated: 6/00

I. Project: Refine the e-mail reference service to expand services to remote patrons.

Project Start: FY 1999/2000 **Project End:** FY 2000/2001

Responsibility: Reference Network (RefNet) / Information Services

Funding: N/A

Purpose: The project will provide better mechanisms to submit, reply, and track questions asked and answered.

Action Plan: RefNet will set up a committee to recommend changes to the existing service.

Status: In process. RefNet is evaluating this service.

Updated: 6/00

J. Project: Facilitate the use of Electronic Data Interchange (EDI) for online ordering and reporting with vendors.

Purpose: EDI automates the transmission of expanded purchase order and invoicing information. Currently, Acquisitions staff transmit electronic purchase orders using a format that transmits only limited information to the vendor. Purchase orders transmitted using the EDI format would include additional information that vendors need for pre-processing. Invoices would also be transmitted to the Library; currently invoices are handled manually. DRA has implemented EDI purchase order and/or invoice capability with some vendors and is further developing the product.

Project Start: FY 1999/2000 **Project End:** FY 2001/2002

Responsibility: Automation Services / Technical Services

Funding: Automation Services / Technical Services

Action Plan: Purchase DRA's EDI license. Evaluate EDI purchase order and invoicing capability with vendors that have either or both EDI formats available with DRA. Test EDI transactions and develop implementation procedures.

Status: Automation Services has purchased the DRA EDI software license. Acquisitions staff are reviewing the documentation and will be working with vendors with whom EDI capability with DRA system is available.

Updated: 7/00

K. Project: Integrate the Inter-Library Loan (ILL) process with the online system.

Purpose: This project will integrate the ILL process with the DRA system and allow patrons from other library systems to request materials. The system should provide automatic tracking and notification for patron-placed requests.

Project Start: FY 2000/2001 **Project End:** FY 2001/2002

Responsibility: IRMO / ILL / Automation Services

Funding: To Be Determined

Action Plan: Explore methods to facilitate regional resource sharing among BALIS, PLS, SVLS, MOBAC and North Bay libraries including direct placing of reserves by patrons to those libraries. IRMO will keep us informed about developments with other area libraries and the Library of California. BALIS ILL Committee representatives from SFPL will keep us informed about vendor software developments that would expedite patron-placed reserves to other systems.

Status: In planning.

Updated: 6/00

L. Project: Standardize and refine printing capabilities on public access workstations.

Purpose: This project will ensure uniform functionality for all public access printers and provide quick resolution to problems.

Project Start: FY 2000/2001 **Project End:** FY 2001/2002

Responsibility: Automation Services / Chief of Main / Chief of Branches

Funding: To be determined

Action Plan: Evaluate the IKON contract to determine if it is providing adequate service to our patrons. If not, evaluate other vendors' capabilities for providing this service. Explore options for providing free printing.

Status: In process. Evaluating the Pharos system as an alternative to IKON.

Updated: 6/00

M. Project: Standardize technology for patrons with disabilities as mandated by the Americans with Disabilities Act (ADA). Provide ADA access points convenient to patrons who need these services. Provide a mechanism to allow feedback on how well the technologies are meeting the needs of these patrons.

Purpose: This project will ensure equal access to all Library resources for patrons with disabilities.

Project Start: FY 1999/2000 **Project End:** Ongoing

Responsibility: Automation Services / Access Services

Funding: Automation Services / Grant Funds

Action plan: Money was allocated in the FY1999/2000 budget to replace older ADA workstations in the Main Library. Access Services will determine types of ADA services provided in branches and how to provide the equipment. Access Services will develop a method for allowing feedback by patrons using the technology and evaluate how well it is serving the needs of this community.

Status: Technology upgrades are in process. Evaluation of services is in planning.

Updated: 6/00

N. Project: Develop policies and procedures for copyright issues related to technology and online resources.

Purpose: This project is designed to protect SFPL's copyrighted material, including web pages and local databases, and to limit the Library's liability for patrons' use of copyrighted materials and other resources.

Project Start: FY 1999/2000 **Project End:** Ongoing

Responsibility: Automation Services / IRMO / NetCom

Funding: N/A

Action Plan: The Digital Millennium Copyright Act of 1998 protects library databases and web pages from copyright infringement. SFPL is to determine the designated agent for receiving notification of copyright infringement and file the necessary forms with the Library of Congress. NetCom will investigate developing policies and procedures related to copyright issues.

Status: In planning. NetCom has discussed copyright issues but no formal plan is in place.

Updated: 6/00

O. Project: Integrate E-commerce tools to allow patrons to perform transactions online.

Purpose: This project will facilitate customer service by allowing patrons to conduct secured transactions over the Internet to pay fines and fees, or to donate money to the Library. Patrons may also be able to register online for library cards.

Project Start: FY 2000/2001 **Project End:** FY 2001/2002

Responsibility: Automation Services / Management Team / Borrower Services

Funding: To be determined

Action Plan: DRA has committed to moving forward on development of E-commerce. Monitor DRA developments and implement when appropriate. Investigate the use of Adobe Acrobat fill-in forms or equivalent for online registration.

Status: In planning.

Updated: 6/00

P. Project: Provide graphical Internet access to patrons with portable computers inside library facilities.

Purpose: This project will result in patrons' ability to use the SFPL network infrastructure to connect their personal devices to the Internet. This will allow patrons with laptop, notebook, or hand-held computers to use SFPL resources and download directly to their own systems, thereby freeing up public computers that would otherwise be in use.

Project Start: FY 2000/2001 **Project End:** FY 2001/2002

Responsibility: Automation Services

Funding: Automation Services

Action Plan: Upgrade Main Library network equipment to allow IP connections at reader tables. Purchase furniture for branches to accommodate network connections for patrons. Develop security procedures to prevent unauthorized access to network resources.

Status: In process. The Main Library Network Upgrade Project submitted to COIT accommodates this project. The budget for this project has been approved.

Updated: 6/00

Q. Project: Develop text and multi-media online training tools, pathfinders and informational programs for both staff and the public. Develop the capability to broadcast library programs to remote users at selected branches. Develop online forms for the public to sign up for Library-sponsored training and programs.

Purpose: This project will provide enhanced training capabilities for both staff and patrons and expand Library programming via electronic communications.

Project Start: FY 1999/2000 **Project End:** Ongoing

Responsibility: IRMO / RefNet / NetCom / Media Services/ Various divisions sponsoring programs

Funding: Incorporate into Media Services / Friends & Foundation funding effort for Branch Bond Issue

Action Plan: RefNet and NetCom to determine best tools for online training. Automation Services will develop Multicast and Unicast (multi-media presentations on designated computers) capabilities for the network and investigate tools such as Adobe Acrobat fill-in forms. Media Services will determine the best and most cost-efficient method to broadcast programs and will develop a timeline and budget. Various divisions that regularly sponsor programs that patrons need to sign-up for -- such as the summer reading program -- will develop forms that can be posted online.

Status: In planning. Committee assignments need to be addressed. Emerging technology will make this project easier to accomplish in the future.

Updated: 6/00

IV. SEAMLESS INTERFACE

Seamless Interface is defined as facilitating the access to our electronic resources; it relates to the public and staff's interaction with the Library's electronic presence. Issues that are being looked at include providing a single, easy-to-use interface, making navigation through the system easier, and having consistency in the methods of access and look of the screens. These projects have been grouped into four sections:

- A. Regional Connectivity, which addresses our cooperation and collaboration with other libraries, departments and local organizations.*
- B. Gateway issues, which include community information files, standard interfaces, web page development and access to web resources.*
- C. Catalog Enhancements, such as making the catalog easier to use, developing multilingual access and implementing catalog clean-up projects.*
- D. Interactive Access, under which we include such activities as providing online forms and registration for workshops.*

A. Regional Connectivity

1. Project: Z39.50 access to other library catalogs.

Purpose: This project will make it possible for users to search other libraries' catalogs the same way they search our own, and implement a reciprocal patron-placed reserves program.

Project Start: Continuous **Project End:** Ongoing

Responsibility: IRMO / RefNet / Automation Services.

Funding: Regular Budget / Grant Funds

Action Plan: It is the goal of SFPL to expand our resources by enabling connections with other libraries. By using the standard (Z39.50) protocol we will be able to offer to our patrons a greater variety of resources and services through resource sharing. Among the services we hope to offer are patron-placed reserves and/or ILL requests in other catalogs. This project depends upon the collaborative efforts of many institutions and the development of appropriate technology.

Status: IRMO, together with other Golden Gateway libraries, has submitted a Library of California grant proposal to fund a project to explore resource-sharing options using the Z39.50 protocol.

Updated: 6/00

2. Project: Sharing subscription resources.

Purpose: SFPL will be able to lower the cost of commercially available databases by participating in resource sharing agreements with Bay Area Library and Information System (BALIS), the State Library, or other regional library organizations. This will require collaborative efforts by all the institutions involved. Examples of existing resource sharing programs include reduced pricing for Gale databases thanks to a deal arranged by BALIS, and the State Library's arrangements for the RAND California database.

Project Start: Continuous **Project End:** Ongoing

Responsibility: IRMO

Funding: IRMO / Grants

Action Plan: To be developed

Status: IRMO, along with a number of BALIS libraries, has submitted a Library Services Technology Act (LSTA) grant proposal for a shared e-book program.

Updated: 6/00

3. Project: Linking to Internet/intranet resources offered by other City departments.

Purpose: By linking to local resources through the Internet/intranet, SFPL will be able to offer access to city databases and other local resources previously unavailable. An example of this is the Fictitious Business Names Index; there is also some interest in linking to the DTIS Intranet.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Coordinated by the Electronic Services Manager, with the assistance of the San Francisco Documents Librarian

Funding: Regular Budget

Action Plan: To be developed by the Electronic Services Manager and the San Francisco Documents Librarian

Status: Currently, there are links to City agency pages from our homepage. The Government Information Center maintains these links.

Updated: 6/00

4. Project: Encourage the establishment of links from other local organizations to the Library's web site.

Purpose: SFPL will increase access to local information resources and increase the Library's visibility by encouraging the placement of links to our web site on other organization's web sites. For example: titles on bestseller lists could be linked to those titles in our catalog; online listings of literary events could be linked to the Library's monthly calendar of events; and online calendars of activities for children could link directly to the Library's calendar of programming for children.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Coordinated by NetCom with the assistance of Public Affairs.

Funding: Regular budget

Action Plan: To be developed by NetCom and Public Affairs.

Status: N/A

Updated: 6/00

B. Gateway

1. Project: Continue to expand community information files.

Purpose: This project will provide increased access to local government and social organizations.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Community Database Services

Funding: N/A

Action Plan: Community Databases Services will continue to solicit information about community organizations, update the database, and train people to use the database.

Status: As of June 2000, the Library's Community Databases project has been in operation for several years, and makes available to the public a comprehensive database of more than 4,000 local government agencies, health and human service providers, community organizations and programs, and neighborhood and merchants' associations.

Updated: 6/00

2. Project: Improve the Library's web presence.

Purpose: This project will create a consistent "look" for SFPL's electronic system.

Project Start: Continuous **Project End:** Ongoing

Responsibility: NetCom / Chief of Branches / Ethnic Services Committee

Funding: N/A

Action Plan: This project will progress in three separate areas. First, the design of SFPL's web pages will be standardized by the introduction of a template that will be used by all staff responsible for creating department pages. A second direction will be the creation of branch web pages under the aegis of the Chief of Branches. The third element will be the development of multilingual web pages.

Status: As of June 2000, a standardized template has been adopted for all SFPL web pages and is being used for all Internet pages. The development of branch web pages has not yet been systematically started. The Ethnic Services Committee is currently examining the question of multilingual web pages, working to determine which web pages should be made available in which languages. Pages in languages that use the Roman alphabet are expected to be introduced within one year, while pages in non-Roman alphabets will probably require at least two years to complete.

Updated: 6/00

3. Project: Continue to identify and provide access to web resources.

Purpose: This project will provide the greatest possible access to information resources on the Internet in all fields, in accordance with the Library's collection development policy.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Departments / Branches / IRMO / NetCom

Funding: N/A

Action Plan: Staff in the various departments and branches will identify suitable Internet resources relevant to their subject areas, and will incorporate links to these sites on the Library's "Internet Resources" page.

Status: As of June 2000, NetCom inaugurated subject-based access to Internet resources, rather than access based on the departmental structure of the Main Library. This approach to web sites is in use; new sites are being added to it regularly by department staff.

Updated: 6/00

4. Project: Improve the catalog interface.

Purpose: This project will develop a system that allows both simple searches of the catalog and comprehensive searches of multiple resources, including subscription databases and Internet sites.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Catalog Review Committee

Funding: N/A

Action Plan: This project involves several facets. The first and most readily accomplished is the simplification of the Main Library location code designations used in the public catalog, a problem that was highlighted by the Post-Occupancy Evaluation (POE). The second element is the incorporation of periodicals holdings into the main catalog; currently these holdings are maintained in a separate system that is not web-compatible. There are several potential approaches to this project, and it is not yet clear which one will have the greatest long-term benefits. Finally, the Library will encourage vendors to develop standardized interfaces, in order to make it possible for our patrons to use a single interface to all subscription databases, instead of forcing patrons to learn multiple search techniques.

Status: In March 2000, the Catalog Review Committee was established to review various issues that have been noted by staff and patrons as impeding access. The development of an improved catalog interface is a high priority; a list of proposed Main Library location codes was recently submitted to the Main Library's managers for consideration. The issues of incorporating the periodical holdings into the catalog and encouraging vendors to develop standardized interfaces will be reviewed in the near future.

Updated: 6/00

5. Project: Digitizing unique collections.

Purpose: This project will increase access to the Library's unique and/or fragile collections.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Multimedia Unit / Automation Services / SF History Center

Funding: N/A

Action Plan: The first order of business is to continue scanning the San Francisco Historical Photograph Collection. In addition to this ongoing work, the Library needs to identify collections suitable for digitizing. Some possibilities include such unique collections as branch archives and the Gay/Lesbian archives. It will be necessary to establish, in cooperation with IRMO and the SF History Center, some guidelines for assessing the suitability of collections for digitization.

Status: As of June 2000, the Library's Multimedia Unit has been digitizing its Historical Photograph Collection for several years, and now provides web-based access to 20,000 such photos. Other collections need to be evaluated for digitizing. A grant proposal was recently submitted to the California State Library to fund the digitizing and microfilming of San Francisco voter handbooks, many of which are decaying due to their highly acidic paper. If this grant is awarded to the Library, it will pay for the digitizing of approximately 60,000 pages of voter handbook text, dating back to 1907.

Updated: 6/00

C. Catalog Enhancements

1. Project: Simplify the functionality of the catalog for users.

Purpose: To make the catalog easier to use for all patrons. The questions both public and staff have about using the catalog indicate that there is confusion about the functionality of the catalog as well as the information presented in the catalog.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Technical Services / Automation Services

Funding: N/A

Action Plan: Establish a Catalog Review Committee to receive, discuss and find solutions for questions, comments and suggestions the public and staff have about the catalog.

Status: As of March 2000 the Catalog Review Committee is established. Its first task is to look at issues raised regarding the catalog by the way-finding

studies reported in the POE. Final recommendations on this project are expected in July. The Committee is developing a list of issues to resolve next.

Updated: 6/00

2. Project: Implement available multilingual displays in the catalog.

Purpose: To make the catalog easier to use for patrons whose first language is not English.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Automation Services / Ethnic Services Committee

Funding: Automation Services

Action Plan: Automation Services will develop procedures to set display of non-Roman characters in the Web2 catalog using Netscape or provide another browser solution to display these scripts. Automation Services will determine the availability of DRA-supplied language interface(s) for Web2. The Ethnic Services Committee will select the language interfaces and Automation will activate the selected interfaces when they are available.

Status: As of June 2000, the two text-based public access interfaces (standard text-based interface and the PACv2 interface with pull-down menus) have options to display Spanish language screens. Spanish subject headings are added to Spanish language bibliographic records. All Chinese language and some Korean and Japanese language-cataloged records have the capability to display vernacular characters. The displays of these non-Roman scripts are available only in Web2 using the Internet Explorer browser.

Updated: 6/00

3. Project: Integrate the periodicals database into the bibliographic database.

Purpose: This project will make it easier for patrons to find periodicals owned by the Library.

Project Start: FY 1999/2000 **Project End:** FY 2001/2002

Responsibility: Technical Services / Automation Services / Catalog Review Committee

Funding: To be determined

Action Plan: Technical Services and Automation Services will implement the integration of the two databases at the time of migration to the new system platform projected to begin FY 2001/2002. The Catalog Review Committee will identify method(s) within the present configuration to assist patrons with locating and accessing the periodicals database.

Status: The periodicals database is currently hosted by an Innovative Interfaces system which is not compatible with our DRA catalog, nor is it web-accessible. Some options to consider are purchasing the web version of the Innovative system, integrating the periodicals holdings with the DRA system, or find a more seamless way to move from DRA to the periodicals database. The Catalog Review Committee is scheduled to review options to facilitate access to the periodicals database in July 2000.

Updated: 6/00

4. Project: Continue efforts at catalog clean-up.

Purpose: This project will eliminate confusing or misleading information in the catalog, and provide the greatest possible access to the library's resources.

Project Start: Continuous **Project End:** Ongoing

Responsibility: Technical Services / Automation Services / Catalog Review Committee

Funding: Technical Services / Automation Services

Action Plan: Technical Services will continue employing in-house and contract staff to catalog and inventory reference and circulating items not represented in the catalog. Automation Services will develop and implement a schedule for routine database maintenance for purges of deleted, missing, etc., items. Automation Services, in consultation with the Recon Unit of Technical Services, will develop an implementation plan of database clean-up activities identifying work that is to be done in-house and work that requires custom programming.

Status: Catalog clean-up has been an ongoing process and much has been accomplished by Automation Services staff, Technical Services' Recon Unit, and contract staff. Automation Services prepared a synopsis of catalog clean-up projects. In March 2000 a major purge was completed of 511,601 items known to be lost, missing and withdrawn, resulting in the clean-up of 25,374 unique titles. The Recon Unit and contract staff continue to provide cataloging and inventory for items not represented in the catalog.

Updated: 6/00

D. Interactive Access

1. Project: Investigate online translation services.

Purpose: This project will aid staff in communicating with patrons who have limited command of English.

Project Start: FY 2000/2001 **Project End:** FY 2000/2001

Responsibility: Ethnic Services Committee

Funding: N/A

Action Plan: English-speaking patrons can be served by all staff, but patrons who speak languages other than English can only be served when (and if) staff who speak their languages are on duty. It is recommended that Library staff analyze the usefulness of real-time Internet translation services (such as altavista.com and freetranslation.com) and publicize their findings at staff meetings and in *Folio*, encouraging widespread usage particularly among public service staff.

Status: To be started

Updated: 6/00

2. Project: Implement a regular online public survey program.

Purpose: This project will gather public feedback on Library programs and services.

Project Start: FY 2000/2001 **Project End:** Ongoing

Responsibility: NetCom

Funding: N/A

Action Plan: The Library's homepage provides a mechanism for communicating with patrons, of whom more and more use only our electronic resources. By incorporating an online survey into the homepage, patron feedback could be solicited on any number of topics, from public awareness of bond measures to usability of the catalog. It is not necessary for the topics themselves to have an electronic component (i.e. bond measures). For just as the Library conducts regular in-house surveys, conducting online surveys would tap the users who don't visit Library

buildings. The Committee recommends that NetCom work with all interested Library units to coordinate a schedule of public surveys. Although NetCom would coordinate the surveys, the content of and responses to the surveys would be the responsibility of each unit.

Status: To be started.

Updated: 6/00

V. APPENDICES

Appendix A.

TECHNOLOGY PLAN COMMITTEE MEMBERS

CURRENT MEMBERS

Vivian Pisano (Chair)
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Technical Services
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FORMER MEMBERS

Cathy Sanford
Former Director,
Automation Services

Steven Lew
Former Manager,
Network Systems

Appendix B

GLOSSARY

ACOB: Assistant Chief of Branches

ACOM: Assistant Chief of the Main Library

ADA: See "Americans with Disabilities Act."

Adobe Acrobat: A type of software used to transmit forms and documents over the Internet.

Americans with Disabilities Act (ADA): A federal law that mandates equal access to facilities and programs for people with disabilities.

Automation Services: A division of the Library responsible for the purchase and maintenance of computer hardware and software.

BALIS: Bay Area Library and Information System, a cooperative of Bay Area libraries, including Alameda Free (City) Library, Alameda County Library, Berkeley Public Library, Contra Costa County Library, Hayward Public Library, Livermore Public Library, Oakland Public Library, and the San Francisco Public Library. These libraries share materials and jointly subscribe to some databases.

Bibliographic Database: The database that stores the Library's catalog records.

BOA: The Bureau of Architecture, a unit of the Department of Public Works.

BOE: The Bureau of Engineering, a unit of the Department of Public Works.

Borrower Services: The unit of the Main Library that checks books in and out, as well as registers patrons.

Browser: A type of software that allows a user to search (browse or "surf") the Internet; Netscape and Internet Explorer are the two most popular types of browser software.

Catalog Review Committee: A Library committee established in April 2000 to examine ways to improve the computer catalog. It is composed of representatives from the Catalog Department, the Main Library, the branches, IRMO, and Automation Services.

CCSF: A commonly used abbreviation for the City and County of San Francisco.

Chief of Branches: The Library's chief manager for the branches.

Chief of Main: The Library's chief manager for the Main Library.

Chief of Technical Services: The Library's chief manager for the Technical Services Division, which includes the Catalog, Acquisitions and Periodical Processing, and Preservation departments, and the Automation Services Division.

"Classic" System: See DRA "Classic" System.

COIT: See the Committee On Information Technology.

Collection Development Policy: A document that describes the Library's policy in acquiring books and other materials. It outlines the scope of the various collections, whether they will be developed in-depth or at a more general level.

Committee On Information Technology (COIT): An organization within the city's government that oversees and approves automation programs proposed by the various city departments. COIT approval is necessary before any substantial project can be started.

Community Database Services: A unit of the Library that maintains the database of local government agencies, health and human service providers, community organizations and programs, and neighborhood and merchants' associations.

Database: A collection of information organized in a specific way to allow rapid access. A typical database consists of "fields" of data -- for example, the Library's bibliographic (catalog) database has fields for an author's name, a book's title, and the subject headings.

Department of Telecommunications and Information Services (DTIS): A department of the city's government that is responsible for electrical, electronic and telephone services. The Library interacts with DTIS chiefly for its telephone and leased data-line connections between the Main Library and the branches; DTIS also does cabling work inside Library buildings.

Desktop: In computer terminology, the default screen of a computer, showing the icons for the various programs, documents or services available to the user.

Digitizing: The process of scanning photographs or pages of text into a computer so that they can be accessed through the World-Wide Web.

DPW: The Department of Public Works, a part of the San Francisco city government.

DRA: Data Research Associates, Inc. The vendor that provides the online catalog system used by the San Francisco Public Library.

DRA "Classic" System: The shorthand designation for the text-based computer catalog.

DTIS: See Department of Telecommunications and Information Services.

Dumb Terminal: A computer workstation that is completely dependent on a remote computer -- it has no computing power of its own, and so it is "dumb" compared to a "smart" workstation that uses a PC. The trend in computer catalogs is toward replacing dumb terminals with PCs that allow graphical access.

E-book: An "electronic book" -- one of the more recent trends in publishing. E-books come in several varieties; some require a special reader into which you load the electronic text of a book, while others are viewable on PCs.

E-commerce: Electronic commerce, the transaction of monetary exchanges by means of computers. The Library is considering this type of service for the payment of fines and fees.

E-mail: Electronic mail, a means of sending text messages over a computer network. E-mail is used extensively in the Library for communications among staff.

EDI: An abbreviation for "Electronic Data Interchange," a system used by several Library vendors for the ordering and invoicing of materials.

FM-1: A facilities management software used by the Library's Engineering Department to track equipment, service requests and regularly scheduled maintenance.

FY: Fiscal Year, the city's financial year, running from July 1st to June 30th.

Gale: A vendor that provides several databases used by the Library, including Associations Unlimited. Gale recently purchased Information Access Corporation, the vendor that provides the InfoTrac databases.

Gates Library Initiative (GLI): A grant-making program of the Bill and Melinda Gates Foundation. The Library Initiative provides money to libraries to buy computers for public use. SFPL recently received such a grant with which it purchased 101 PCs for use in 14 branches and the Main Library.

Gateway: The "gateway" to the Library's resources through the Internet. In other words, the interface to the Library and its databases.

GLI: See the Gates Library Initiative.

Golden Gateway: Formerly known as "Region II," this is a regional subdivision of California established by the State Library. The Golden Gateway includes libraries of all types within the 14 Greater Bay Area counties extending from Mendocino in the north to Monterey in the south and east to Contra Costa and Solano. It includes the San Francisco Public Library as well as the other BALIS libraries, plus PLS, MOBAC, the Silicon Valley Library System and the North Bay Cooperative.

Graphical Environment: Any type of computer access that features the ability to display images and uses a "point-and-click" (mouse-driven) method for making selections.

Graphical User Interface (GUI, pronounced "gooey"): A computer interface that is used in a graphical environment -- in other words, a computer system that has the ability to display pictures ("graphics") and uses a point-and-click method for selecting options.

GUI: See "Graphical User Interface.

HTML: Hyper-Text Mark-up Language, the type of computer coding most commonly used to create web-pages for Internet sites.

IKON: A vendor that currently supplies the copy machines and pay-printers used by SFPL.

ILL: See Inter-Library Loan.

InFoPeople (InFoPeople): A grant program of the California State Library intended to make computers and Internet access more widely available to libraries; it also funds training programs for librarians on how to use the new technology.

Infrastructure: In this case, the physical equipment and connections supporting the Library computer systems; more broadly, any combination of equipment and/or organizations intended to support a service or activity.

Interface: The screens and methods used for searching the Library's catalog and other resources -- in other words, what the Library's computer screens look like, and how they operate.

Inter-Library Loan (ILL): A service that allows patrons of one library system to borrow books and other materials owned by other libraries across North America.

Internet: The world-wide computer network that has become an integral part of the Library's services. The Internet provides access to information resources outside the Library, including both free and subscription resources. The term "World-Wide Web" is also often used as a name for the Internet, but more properly this term should be used only for the graphical part of the Internet.

Internet Explorer: A software program developed by Microsoft for use in browsing the Internet; it is similar to Netscape.

Intranet: See StaffNet.

IP: An abbreviation for "Internet Protocol;" IP connections allow computers to network with one another. Providing IP connections for notebook computer users inside the Library would allow patrons to plug in to the Library's computer system in a simple and effective way using their own portable computers.

IRMO: The Information Resources Management Offices, a division of the Library [responsible for adult services, electronic resources and adult collection development.]

[that oversees adult collection development, electronic services development, system-wide reference services, regional library networking, and inter-library collection development and reference projects.]

LAN: See Local Area Network.

Library Services and Technology Act (LSTA): A federal government grants program administered by the California State Library. It provides funding for technology-oriented projects.

Local Area Network (LAN): A network linking several computers that are relatively close together. LANs are usually confined to a single building and often are limited to a single area within a building.

LSTA: See Library Services and Technology Act.

Lynx: A text-based form of access to the World-Wide Web. Lynx was developed by CERN (the European organization for nuclear research) and allows dumb terminals that cannot display graphics to access most of the World-Wide Web, but the form of access is somewhat clumsy.

Management Team: The Library's senior management group, headed by the City Librarian and composed of the division heads (chiefs, personnel and finance directors).

MOBAC: The Monterey Bay Area Cooperative Library System, a consortium of 24 public, academic and special libraries in the counties of Monterey, San Benito and Santa Cruz on the California Central Coast.

Multicast: A type of broadcast in which the programming is directed to a number of receivers; used for distributing some types of programming, such as training, to a number of specific sites.

Multimedia Unit: A part of the Library's Automation Services Division that scans and catalogs photographs as well as other graphic materials from the Historical Photograph Collection in the San Francisco History Center.

NetCom: The Internet/Intranet Committee, a Library committee composed of staff from all branches and departments charged with overseeing the development and maintenance of the Library's web presence.

Netscape: A popular software browser for the Internet.

OCYS: See Office of Children's and Youth Services.

Office of Children and Youth Services (OCYS): A division of the Library that coordinates programs for children and teens and oversees the selection of materials for these age groups.

OPAC: An abbreviation for "Online Public Access Catalog" -- in other words, a computerized library catalog. Also sometimes called a PAC (Public Access Catalog).

PAC: See OPAC.

PC: A "Personal Computer," or microcomputer.

Peninsula Library System (PLS): A cooperative of library systems on the peninsula; it includes 32 city, county, and community college libraries in San Mateo County.

Pharos: A vendor that makes software for controlling pay printers and can be used for the scheduling of Internet workstations.

PLF: The Public Library Foundation, a grants program administered by the California State Library intended to support basic library services.

PLS: See Peninsula Library System.

Public Affairs: A unit of the Library that handles public information and programming. Among other things, it is responsible for producing brochures and flyers for Library services and events.

RAND: A contraction of "Research and Development," the RAND Institute is a non-profit research organization that provides a database to which SFPL subscribes of statistics and information on California public policy issues.

Recon Unit: An abbreviation for the Retrospective Conversion unit of the Technical Services Division; this small group handles projects to clean-up the data in the Library's computer catalog, including the correction of catalog records.

RefNet: Short for Reference Network, this is a Library committee that oversees reference services and resources. It is composed of public service staff from the Main Library and the branches.

Reqform: An abbreviation for "Requisition Form," a computerized system developed by Library staff for relaying supply and service requests to the Stockroom and Engineer's Department.

Seamless Interface: A term used to describe a computer system in which the user can search multiple information resources simultaneously or individually without having to worry about different commands or navigate through complicated pathways to perform searches. Hence it is "seamless" because the user does not need to be aware of the connections linking different computer systems.

SFPL: An abbreviation for the San Francisco Public Library.

STADCOM: See Staff Training and Development Committee.

StaffNet: The staff "intranet," an in-house network that allows staff to access manuals, policies, procedures and internal directories.

Staff Training and Development Committee: A Library committee charged with developing and evaluating staff training programs.

T-1 Line: A high-speed data (1.544 MB per second; the average home modem allows 56K speed, so a T-1 line is about 25,000 times faster than this) connection. This type of data circuit, leased from the telephone company, is used for computer communications between the branches and the Main Library.

Taos: The name of the Web-based library computer system being developed by DRA. The main component of this system is the Web2 graphical catalog.

Technical Services: A division of the Library responsible for the ordering, cataloging and physical processing of materials. It includes the Catalog Department, Acquisitions and Periodical Processing, Preservation and the Recon Unit.

Technology Oversight Committee (TOC): A Library committee established July 2000 to oversee the implementation and maintenance of the Technology Plan.

Technology Refreshment: A program of regularly scheduled replacement of computer equipment, designed to ensure that all staff are using compatible computers and software.

Terminal: An end-user station -- at minimum, a monitor with a keyboard. Usually limited to "dumb terminals," but in theory even PC workstations can be terminals on a network.

Text-based Interface: A form of computer access that does not allow the use of graphical, point-and-click access; only text can be displayed. Dumb terminals provide text-based access to the Library's computer catalog, and Lynx is a text-based browser for the World-Wide Web.

TOC: See Technology Oversight Committee.

Unicast: A type of broadcasting in which the programming is sent to a single recipient.

Virtual Private Networking: A form of computer networking that allows staff at home to use their own PCs to connect to the Library's PC network, so that they can access files on their work PCs.

VMS: The operating system of DEC (Digital Computer Corporation) mainframe computers. It is used by the Library's current computer system for many functions, including e-mail.

Voice Mail: A telephone service that provides "voice mailboxes" where messages can be left when someone is unable to answer their telephone. In other words, an answering machine on a large scale.

WAN: See Wide Area Network.

Web: See World-Wide Web.

Web2: The web-based public catalog interface in the DRA system.

Web Page: A site on the Internet; a "page" generally represents a screen-full of data.

Wide Area Network (WAN): A computer that extends beyond a single building; the network that connects all the branch libraries to the computer system housed in the Main Library is a Wide Area Network.

Workstation: A computer station used for some form of work; another name for a terminal.

World-Wide Web: Generally speaking this is just another name for the Internet; more specifically, it refers to graphical access to the Internet.

XML: An abbreviation for the Extensible Markup Language, a type of computer coding used to create some web-pages; it is a more advanced version of HTML.

Z39.50: A data communications standard that allows computerized catalogs made by different companies to search one another and display the results. For example, a patron using the San Francisco Public Library's DRA catalog could do a search in the Berkeley Public Library's catalog (made by Innovative Interfaces), without the San Francisco patron having to learn the search commands of the Innovative system.

Appendix C TECHNOLOGY SKILLS

1. Staff Skills – August 1999

PROGRAM	NUMBER	PERCENT
Windows		
None	41	11.4
Basic	254	70.8
Expert	64	17.8
TOTAL	359	
Web-Browser/Netscape		
None	24	11.4
Basic	129	61.1
Expert	58	27.5
TOTAL	211	
Web-Browser/Lynx		
None	14	7.4
Basic	123	65.4
Expert	51	27.1
TOTAL	188	
Eudora E-mail		
None	24	50.0
Basic	16	33.3
Expert	8	16.7
TOTAL	48	
VMS E-mail		
None	15	5.9
Basic	183	72.3
Expert	55	21.7
TOTAL	253	
Microsoft Word		
None	31	9.5
Basic	216	66.5
Expert	78	24.0
TOTAL	325	
Excel		
None	111	46.1
Basic	109	45.2
Expert	21	8.7
TOTAL	241	

PROGRAM	NUMBER	PERCENT
<u>Access</u>		
None	83	44.4
Basic	90	48.1
Expert	14	7.5
TOTAL	187	
<u>Pagemaker</u>		
None	44	72.1
Basic	11	18.0
Expert	6	9.8
TOTAL	61	
<u>Network Neighborhood</u>		
None	12	75.0
Basic	4	25.0
Expert	0	0.0
TOTAL	16	
<u>PowerPoint</u>		
None	19	59.4
Basic	11	34.4
Expert	2	6.3
TOTAL	32	

2. Public Skills – August 1999

	<u>MAIN LIBRARY</u>		<u>BRANCHES</u>	
<u>PROGRAM</u>	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
a. Adults				
Windows	9		23	
None		42.0		39.0
Basic		48.0		49.0
Expert		11.0		16.0
Web-Browser	12		29	
None		47.0		42.0
Basic		42.0		42.0
Expert		11.0		16.0
b. Children				
Windows	3		20	
None		15.0		30.0
Basic		80.0		44.0
Expert		3.0		27.0
Web-Browser	3		24	
None		15.0		30.0
Basic		75.0		40.0
Expert		10.0		30.0

Appendix D

GUI IMPLEMENTATION PLAN – WORK SHEET

Date: _____

Branch: _____

☐ **BUILDING INFRASTRUCTURE**

- ☐ Electrical assessment (Matt)*
- ☐ Bureau of Engineering (BOE) reports w/cost estimates (Matt)
- ☐ Prioritize work to be done (Tech. Planning Committee recommends to APG)
- ☐ Environmental hazards (i.e. asbestos) (Rich / Matt)
- ☐ Contract the work (Rich / Matt)

☐ **TELECOM**

- ☐ Buy gear (Automation Services)
- ☐ Install T-1 circuit – Pacific Bell or other (Automation Services)

☐ **INSTALL DATA CONNECTIONS –**

- ☐ Replace old wires (Cat.3 – Cat. 5). Install cabling to new locations [DTIS jurisdiction]
- ☐ Staff recommend equipment/outlet placement (Donna / Debbie / Branch staff)
- ☐ Coordinate with DTIS to do the work (Mike / Vivian)

☐ **EQUIPMENT**

- ☐ Assess existing hardware, including leased equipment/Determine new equipment needs (Donna / Kathy L.)
- ☐ Automation reviews needs; makes recommendations (Mike)
- ☐ Buy equipment (Automation Services)
- ☐ Install equipment (Automation Services)
- ☐ Work with vendors on leased equipment, i.e. IKON (Debbie / Kathy L. / Sybil)

☐ **SPACE PLANNING**

- ☐ Prepare space plan (Branch staff / Donna)
- ☐ Assess furniture needs (Branch staff / Donna / Automation Services)
- ☐ Purchase furniture (Donna / Kathy L.)
- ☐ Install furniture (Matt / VENDOR)

☐ **STAFF/PUBLIC PREPAREDNESS**

- ☐ Staff trained /Train the trainer (Human Resources / Steve M.)
- ☐ Public brochures (Technology Planning Committee / Public Affairs)
- ☐ Public training (Branch / Main staff)
- ☐ Staff troubleshooters identified (Donna / Kathy L. / Automation Services)

(*Parentheses indicate project point person or department)